eFAST QUICK REFERENCE GUIDE – GETTING STARTED WITH eFAST

Welcome to eFAST! This guide is designed to provide you with instructions on how to register with eFAST and solicit a company you are using eFAST for.

The CPUC's eFiling Administrative Support (eFAST) system allows companies and utilities that are regulated by the CPUC to securely and electronically submit applications, documents, payments, and other information directly to the CPUC.

Document Version control

Version Number	Date	Description of changes	Author
1.0 – 1.4		Initial document and edits and changes	Kimberly Siason
1.5	2/21/18	Added instructions for Company Registration Request	Kimberly Siason

1 Registering Your Account

You'll need to register your account if you don't already have one. To register your account, click the **Business Account Registration** link.
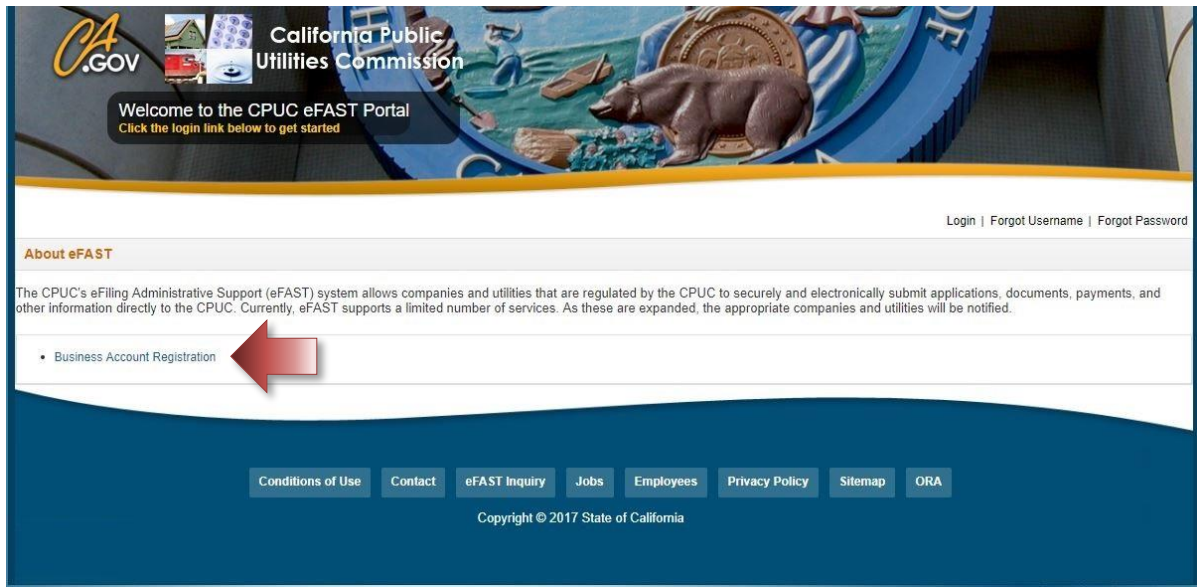
This will open the Business Account Registration screen where you will provide your account information. The fields marked with an asterisk are required. If you need to cancel your registration, click the **Cancel** button.

> **Note**: Your Company may have their own policy in regards to registering your account (e.g. company email address, work phone number).
>
> Please follow your Company's policy if this is the case.

Clicking the **Register Account** button will continue the registration process as shown below.

Go to the inbox for the email address you provided in your registration. Open the email from eFAST with the subject, "Verify Email and Complete Registration". The image shows part of the email:
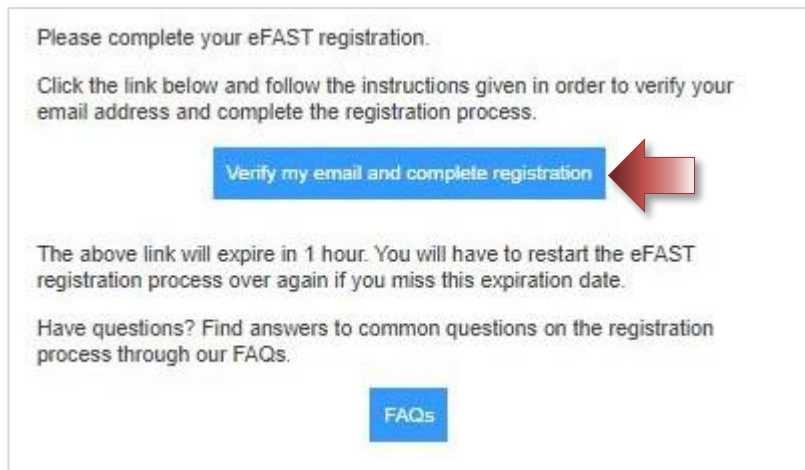
Click on the **Verify my email and complete registration** link. Clicking this button will take you to the final part of registering your account.

Create and confirm your password using the following password rules:

- Cannot contain your account name
- Cannot contain your First or Last name
- Must be at least 8 characters
- Must contain uppercase and lowercase characters, numbers, and special characters

Select and answer your challenge questions.

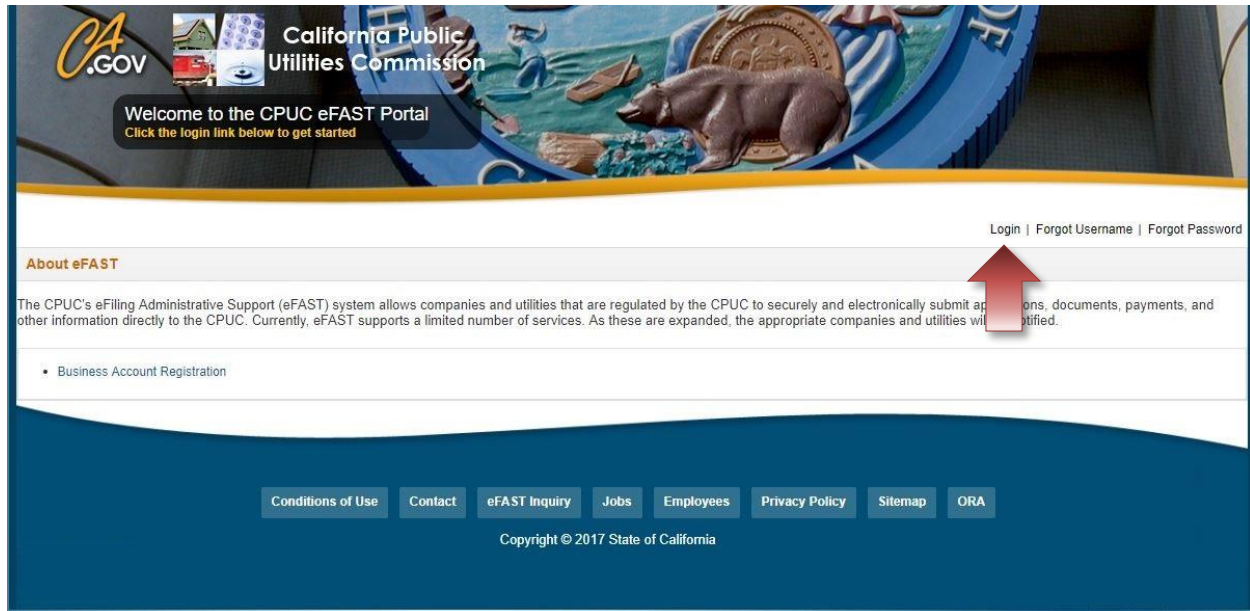Click on the **Submit** button to finish your registration.

Congrats! Your eFAST registration is completed and ready to use.

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2 Logging in

Before logging in, you must have successfully registered your account.

Click the **Login** button to start.

On the eFAST Login screen, enter your Username and Password and click **Login**.

You are now logged into the eFAST system.

You are now logged into the CPUC eFAST Portal
Please make sure you logout when done

Welcome hal9000 Logout

Company:

Welcome to eFAST   My Account   My Company Access   My Applications

You are currently logged into the CPUC eFAST Portal. For security purposes, please make sure that you click the logout link when you are finished or if you need to leave your computer for any reason. You should never leave your computer unattended while logged in.

3   I forgot my username

In the event you forget your username, click on the **Forgot Username** link on the eFAST homepage.
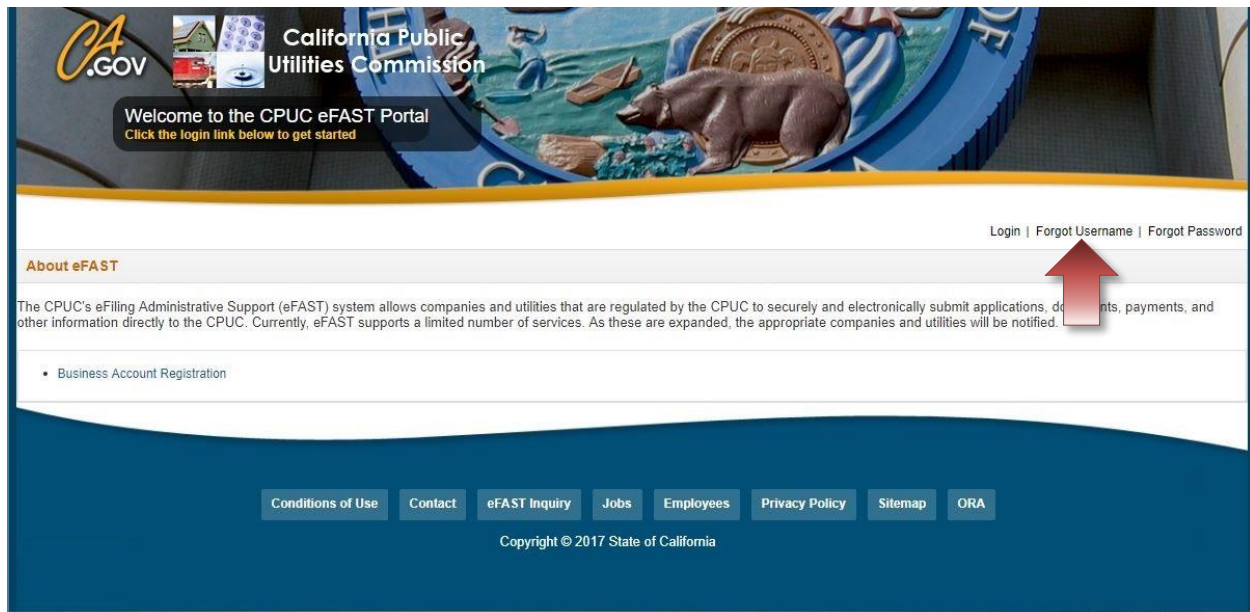
On the Forgot Username screen, enter the email address you used when you registered and click the **Submit** button.
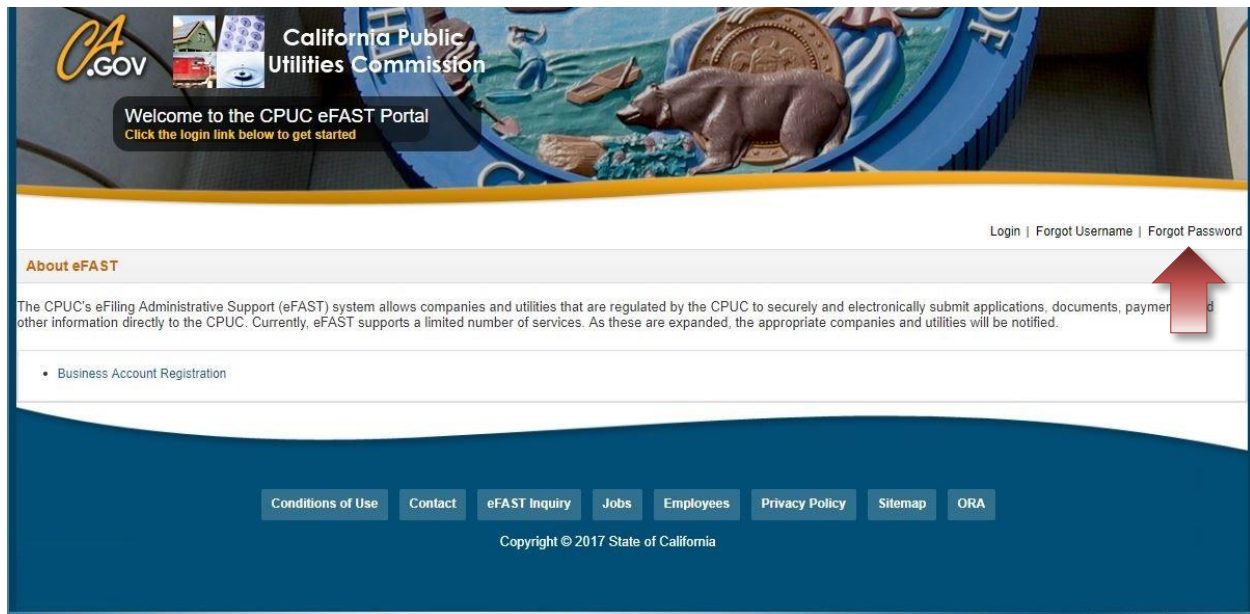

An email will be sent to you with the subject, "Your username in the eFAST system". This email will contain the username that you used when you registered your account.

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4 I forgot my password

In the event you forgot your password, click the **Forgot Password** link on the eFAST homepage.

On the Forgot Password screen enter the email address you used when you registered and click the **Submit** button. An email will be sent to you with the subject, "Reset your eFAST system password".

Clicking on the **Reset your password** link will navigate you to the Reset Password screen.
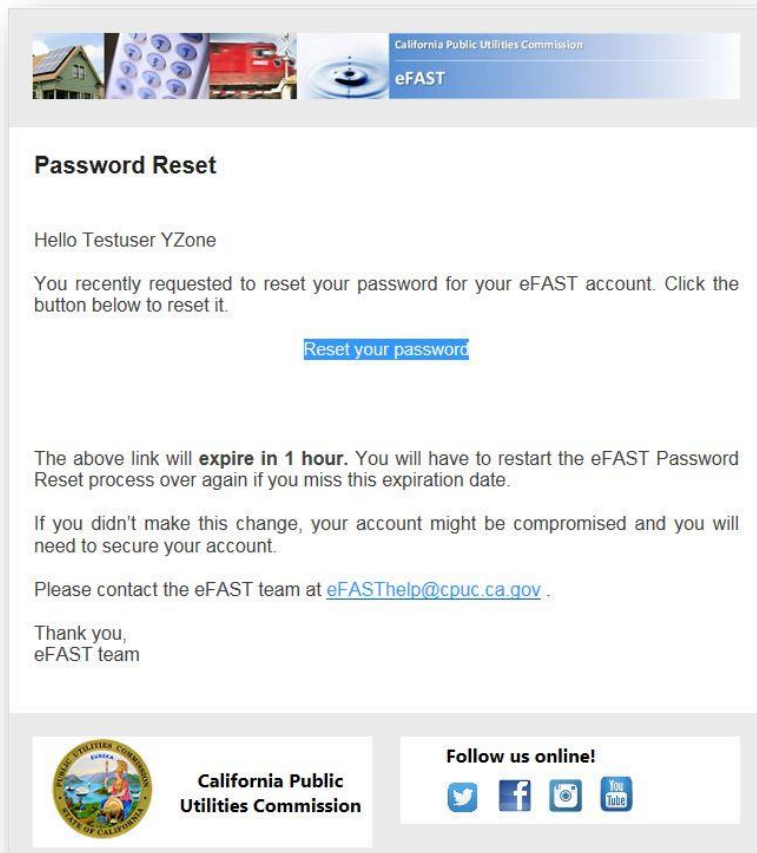
Enter your new password in both the New and Confirm Password fields following the password rules and click **Submit**.

Password Rules

- Cannot contain your account name
- Cannot contain your First or Last name
- Must be at least 8 characters
- Must contain uppercase and lowercase characters, numbers, and special characters

California Public
Utilities Commission

Welcome to the CPUC eFAST Portal
Click the login link below to get started

Reset Password

User Name hal9000

* New Password ··········
* Confirm Password ··········

Submit

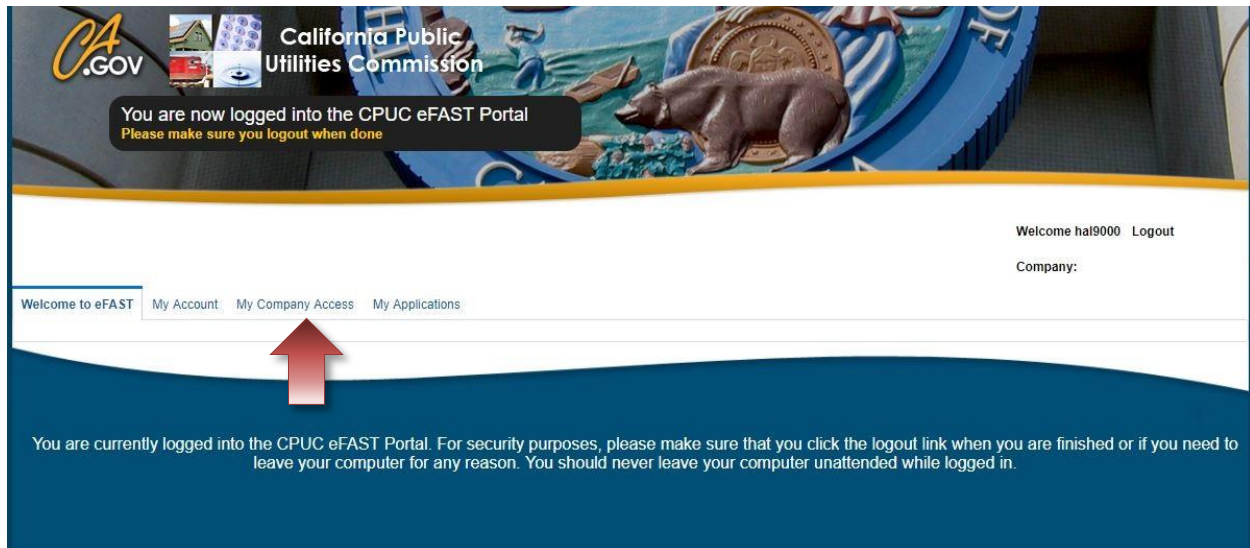| Conditions of Use | Contact | eFAST Inquiry | Jobs | Employees | Privacy Policy | Sitemap | ORA |

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5   Soliciting a company

In order to perform work for any company, you must be first request to be associated with the company. This process is known as soliciting a company. Although your account will normally be associated with only one company, it is possible to have your account associated with several companies.

To start to solicit a company, click on the **My Company Access** tab.

Under the Track My Solicitation Requests section, click on the **Solicit Companies** button.

In the **Search by Company Name** field you may enter the name of the company you are searching for. If your company is not listed, go to the My company isn't listed section of this document.

Click on the line containing your company (this will show in bold as the Selected company). Enter your Contact Details and click the Request button.
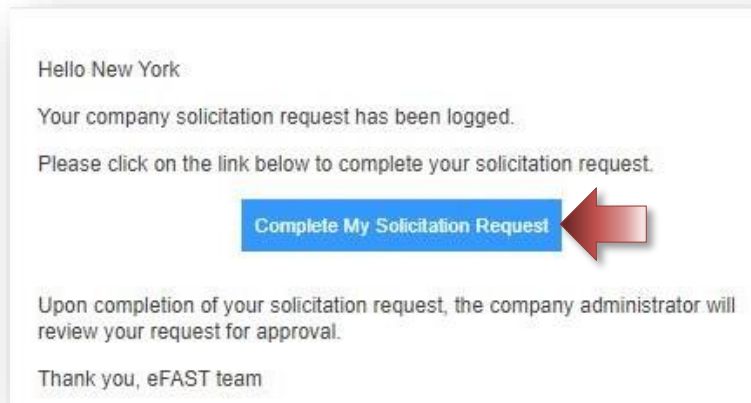
In order to complete the Solicitation Request, you will receive a confirmation email.   You must click on the link in the email titled "Complete My Solicitation Request".

After you do this, the request will be available to be reviewed by the Company Administrator. After the review has been completed, you will receive an email stating if you were approved or rejected.

6 My company isn't listed

When your company isn't listed under the **Solicit Companies** screen, you will need to request that a new company be added. To start this process, click the Request New Company button under the Track My Company Requests section of the My Company Access tab.

In the **Search by Company Name** field, enter the name of the company you are searching for. You do this to verify that your company is not in the listed companies.

Fill in the Company Details and Primary Contact Details for the company which you're requesting to add and click **Request**. At this point, you will need to email us at eFASThelp@cpuc.ca.gov with the subject line of New Company Registration request. In the body of the email please provide us with the name and user name of the person who is to be the primary contact. The Company Registration request is handled manually, and will require the CPUC to contact the person listed as the primary contact. This is done to verify the information that was provided and to establish a Company Administrator. For small companies, it is common for the primary contact and the company administrator to be the same person.

You will receive an email indicating whether or not the company was added.

7   Approving a Solicitation Request (Company Administrators only)

Approving a Solicitation Request will allow the solicitor to be associated with the company you are the Administrator for. When a solicitation request is created by the solicitor, you will receive an email from eFAST notifying you that a request has been made with a link that will navigate you to eFAST. After logging on to the eFAST application, click on the Solicitation Requests tab.
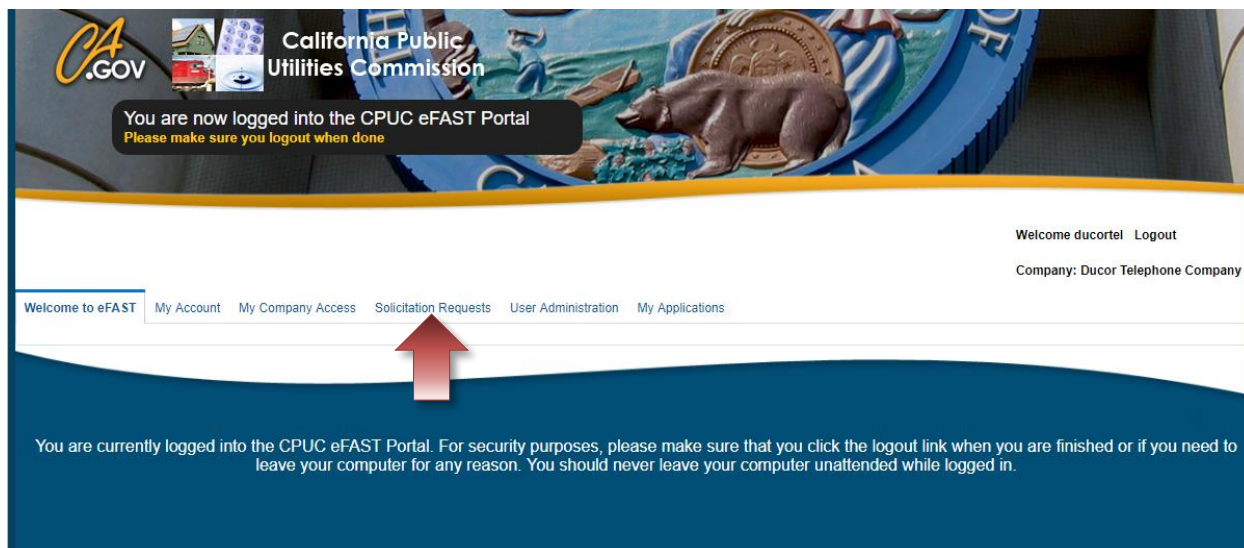
The screen, by default, will display Solicitation Requests that are currently active, i.e., require an action by the Company Administrator. To review the request, click on the **Click to review** link that is in the Actions column.
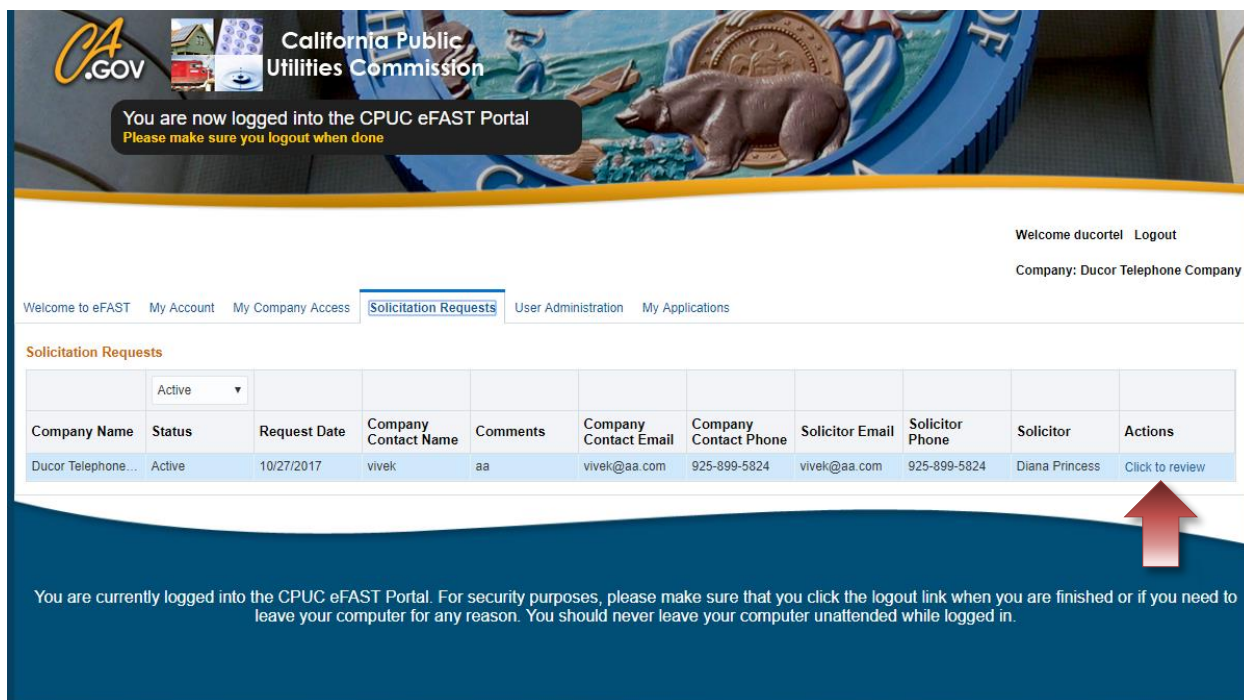
On the Solicitation Details screen you may review the request and elect to Approve or Reject the request. In order to perform either action, Resolution Comments must be entered. After you have taken action on the request, an email will be sent to the user who submitted the solicitation.
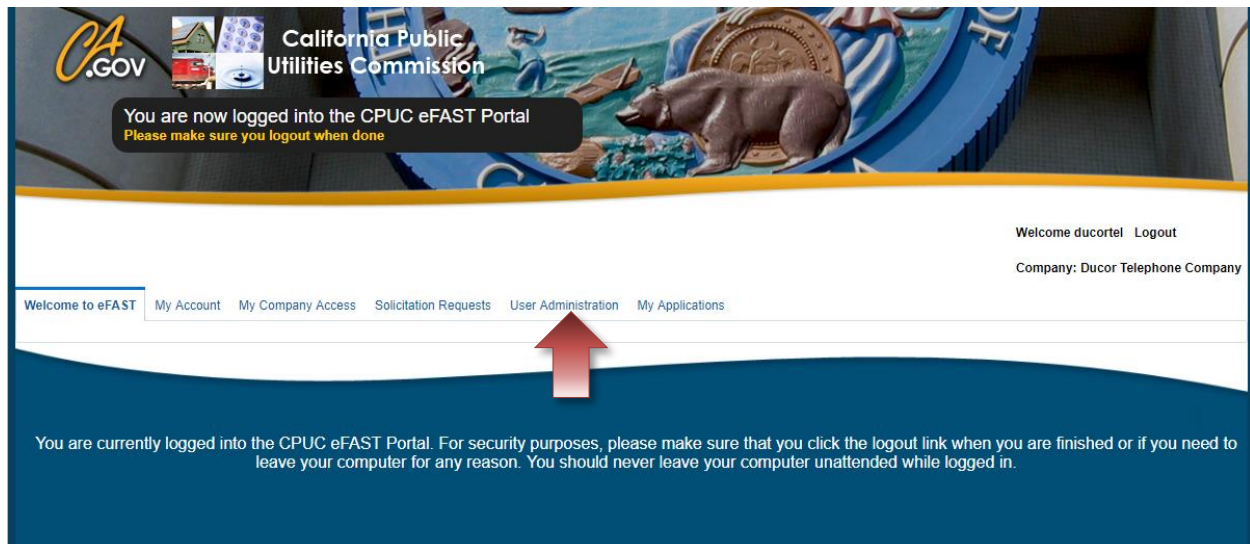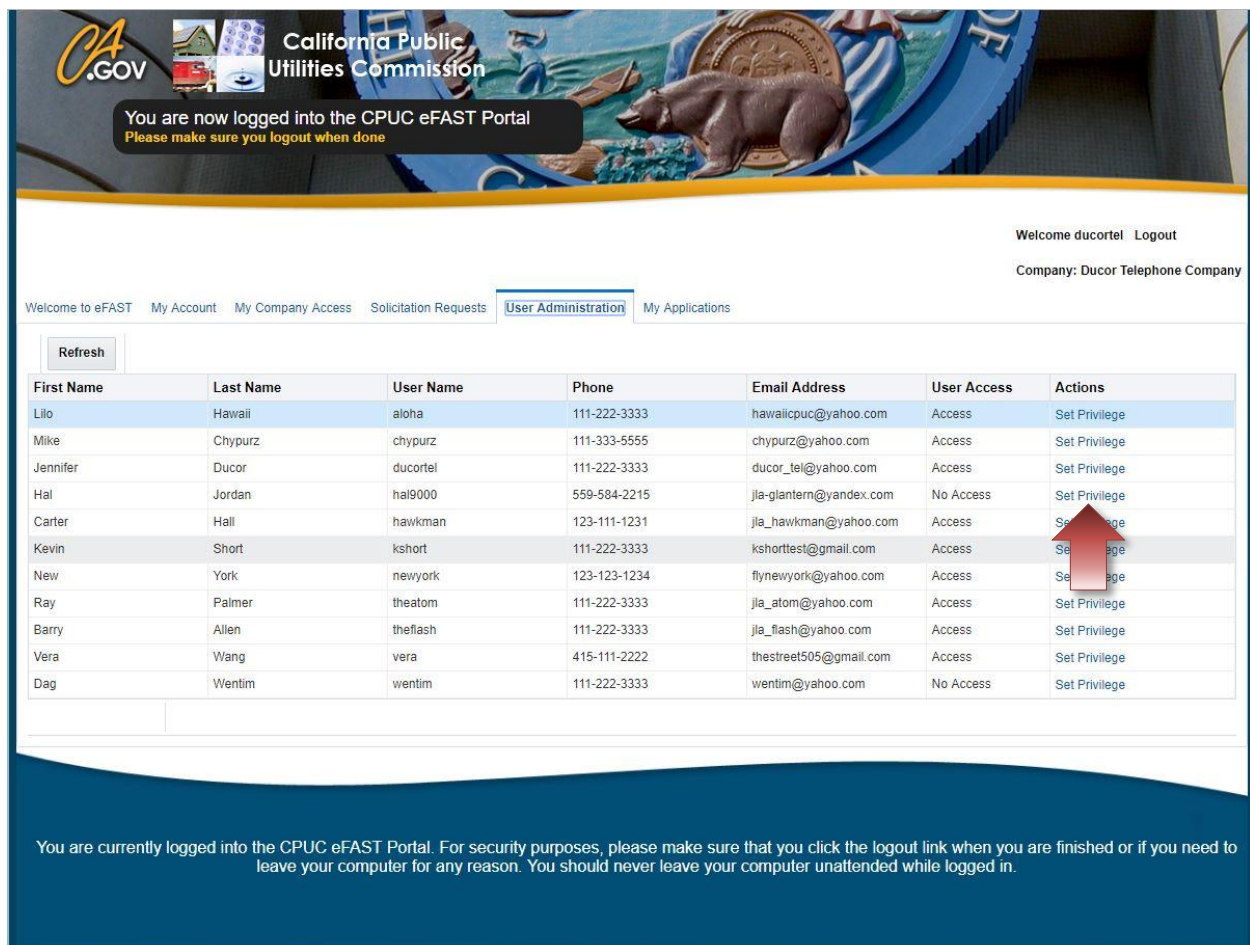
8 Granting user level access (Company Administrators only)

This process starts by logging on to the eFAST application and clicking on the User Administration tab.

To change the user access, click on the **Set Privilege** link that is in the **Actions** column.

On the **Grant or Remove Access for User** screen you can change the privilege of the selected user as a Company Admin as well as for applications hosted on the eFAST application platform (in the below example this would be California Advanced Services Fund). Once the desired privileges are selected, click the Submit button.

9   Additional Help

If you require additional assistance in any of the above sections contained within this document, please feel free to contact the eFAST team at eFASThelp@cpuc.ca.gov.